



Annual Report
2021

Dalena White
Secretary General



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Committees

IWTO Executive

Members of the Executive Committee are nominated by their peers for their commitment to IWTO, support of the global wool community, leadership capacity, and outstanding ability demonstrated in local wool industry structures. Members of the Executive give their time free of charge and share their knowledge to the benefit of all. The Executive Committee is responsible for implementing approved strategies put forward by the various Committees and Working Groups, and for administering the operations of the organisation, as approved by the General Assembly.



Wolf Edmayr
President



Michael Jackson
Vice President



Mirko Lindner
Treasurer



Peter Ackroyd
Member



Sansal Cetin
Member



Liu Jiaqiang
Member



Giovanni Schneider
Member



Craig Smith
Member



Osman Kilic
Special Advisor
for Turkish Relations



Chen Lifan
Special Advisor
Chinese Manufacturing



Pedro Otegui
Special Advisor
for Uruguay

Committees

Contracts & Specifications

The Contracts & Specifications Committee is the approving body for all IWTO Draft Test Methods and for amendments to existing IWTO Test Methods. The members actively initiate the formal adoption of Specifications as IWTO Test Methods, pertaining to the trade of wool in all its forms. The Licensing Panel and Technical Groups (Raw Material Group, Product Group and Wool Innovation & Technology Forum) report to the C&S Committee.



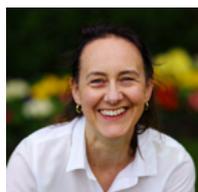
Michael Jackson
Committee
Chair



David Crowe
Committee
Secretary



Wian Heath
Technical Group
Chair



Victoria Fish
Technical Group
Secretary



Jens Nielsen
Licensing Panel
Chair



Enrico Prina
Wool Innovation
& Technology
Chair

Wool Retail Forum

IWTO members need constant contact with the front end of the market, including indicators showing the latest consumer trends and wool purchasing patterns. The wool pipeline depends on clear messaging received from the consumer end in order to align future strategies and remain agile.

Market Intelligence

Committee members collect and analyse global wool textile trade data, providing statistics and forecasts for wool-related industries. These are shared through presentations at events and are published in IWTO's annual report.

Grower Forum

Wool growers offer country-specific reports during each annual congress, keeping farmers connected across borders and sharing best practices to the benefit of all. Networking opportunities are valued by all members.



Peter Ackroyd
Committee Chair



Isak Staats
Committee Chair



Guillau du Toit
Forum Chair

Working Groups

Sustainable Practices

The Sustainable Practices Working Group (SPWG) originated in 2012 to quantify wool's weighting in textile rating schemes. Members of this group have invested more than 650.000 euro to substantiate sustainability claims. The SPWG is currently chaired by Geoff Kingwill with Angus Ireland as vice-chair.

The Technical Advisory Group (TAG) offers peer reviewed scientific evidence to support our wool claims. The activities of this group is sponsored by Australian Wool Innovation (AWI). The TAG is chaired by Dr. Stephen Wiedemann, who represents IWTO in the European Commission's Product Environmental Footprint (PEF) project.

Current TAG Research Projects

- Chemical toxicity – a study to determine the pesticide usage
- Change Modelling - two papers
- Investigating impacts of system boundaries for natural fibres
- Recycling's role in reducing environmental impacts for wool
- Best Practice Care - a study to quantify impacts of laundering on different fibre types
- Assessing the environmental impact of contemporary wool production
- Biodegradation of wool and other fabrics in marine and terrestrial environments
- Critical review of the EU PEF Guidelines

Trade Press Placements

1. Twist Magazine Issue 1: Looking closer at Closets
2. Twist Magazine Issue 4: Winning the endgame with wool
3. WTiN online: Winning the endgame with wool
4. Ecotextile News: Defining Sustainability with Wool
5. Apparel Insider: For Credible Claims, Fashion needs Better Data
6. Politico: A question of credibility – the EU's green transition for textiles

TAG Publications in 2021

1. Assessment of Environmental Impacts from Wool Garments with Best Practice Care – The paper investigates preferred garment use and garment care scenarios and demonstrates how wool can deliver better environmental outcomes, April 2021. Springer: The International Journal of Life Cycle Assessment



Working Groups

Product Wellness

The Product Wellness Working Group (PWWG) originated in 2013. Currently chaired by Angus Ireland, the PWWG provides a strategic forum for industry thought, planning and the establishment of strategies to build and validate the health and wellness credentials of wool textiles.

Chaired by Trevor Mahar, the Technical Advisory Group (TAG) is responsible for the scientific evidence of the health and wellness credentials of wool. The scientific output of this group is entirely sponsored by AWI.

Current Projects

- A global study to establish wool's credentials in the skin health sector and patients suffering from eczema
- The development of a specification for wool base layers to be used by medical professionals in the treatment of eczema
- The impact of sleepwear fibre types on sleep quality in older adults
- Dynamic breathability test methods for the active wear industry and flammability studies for emergency services
- Study to determine the effect of wool compared to cotton sleepwear on the sleep quality of menopausal women
- A study to determine the effect of the fibre type on the stickiness phenomenon experienced when damp fabric contacts the skin

Trade Press Placements

1. Twist Magazine Issue 2: Going on a Mission with Wool
2. WTiN online: Going on a Mission with Wool
3. Politico: A question of credibility – the EU's green transition for textiles



Working Groups

Wool Trade Biosecurity

The Wool Trade Biosecurity Working Group (WTBWG) was established in 2014 and strives to ensure positive animal health outcomes for the global wool industry, including ensuring freedom from emergency animal diseases, such as Foot-and Mouth (FMD).

Chaired by Dr George De Kock, members share information and research between countries and organisations, such as the World Organization for Animal Health (OIE).

Current Projects

The establishment of the Foot and Mouth Disease Advisory Committee, to consider specific OIE regulations regarding the temperature at which wool should be kept and for how long, to kill all traces of the disease. Representatives will also make submissions to OIE to amend the chapter on PPR in the Terrestrial Animal Health Code.



Working Groups

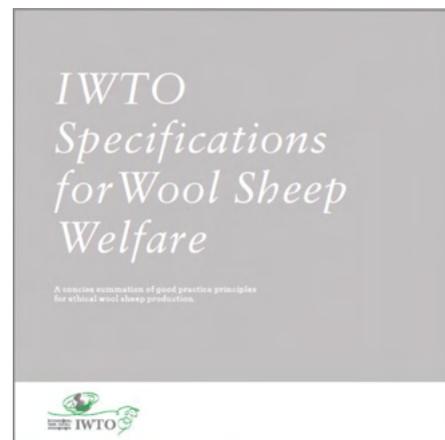
Wool Sheep Welfare

The Wool Sheep Welfare Working Group (WSWG) was established in 2017 with the purpose of supporting best practices in global animal welfare and to collaborate with relevant organisations, such as the OIE.

The IWTO Wool Sheep Welfare Specifications need updating every three years, including the latest country specific information. Chaired by Peter Ackroyd, this working group manages that project.

Current Projects

Update of the IWTO Specifications for Wool Sheep Welfare, as initiated during the Wool Round Table meeting (December 2021) and due for completion in 2023. Kindly sponsored by the American Wool Council.



Wool Policy Reports

IWTO members receive 10 monthly reports per year offering a summary of global economic and trade policy developments, animal disease reports and wool sustainability news.

The reports are compiled by KREAB, the global strategic communications consultancy. Their team of 400 international consultants provide insight and knowledge to a specific consumer segment, and on related subjects including EU policy, global economic drivers, wool trade regulations and sustainability.

IWTO Members receive these reports from their country representatives but can also access previous editions on the IWTO Member Area, under Member Resources.

We thank The American Wool Council for their kind sponsorship of this publication.

Welcome to IWTO's monthly overview of the latest policy developments affecting the international wool industry. Published as a service to IWTO members, the Wool Policy Report includes coverage of global economic and trade-related policy developments affecting the international wool industry.

Contents

- 1 Global Economy
- 2 Wool Trade Regulation
- 3 News from China
- 4 Growers and Sheep Welfare
- 5 Textiles and Apparel
- 6 Sustainability



This report is kindly sponsored by



1 - Global Economy

1.1 Australian wool industry recovered in 2021 from COVID-19 blows during 2020

In 2021, the Australian wool industry recovered from the blows dealt by COVID-19 during 2020 ([Farm Online, 31 December](#)). Despite challenges posed by Chinese electricity shortages and rising shipping costs, the market performed well. According to the President of the National Council of Wool Selling Brokers of Australia (NCWSBA), the long-term view is optimistic. In recent months, wool prices remained stable and the wool industry performed positively despite the appearance of the Omicron variant ([Queensland Country Life, 20 December](#)). Buying activity from China and Europe remained constant.

1.2 AWPFC forecasts Australian wool production to grow by 8% in 2021-2022

The Australian Wool Production Forecasting Committee (AWPFC) predicts Australian wool production will reach 318 million kilograms in 2021-2022 ([Sheep Central, 17 December](#), [Farm Weekly, 10 January](#)). This is an increase of 8% compared to the estimated 284 million kilograms production in 2020-2021.

The growth in production for 2021-2022 stems from favourable seasonal conditions, including strong rainfall and easing drought, in most wool-producing regions of Australia which contributed to abundant feed supply and the broadening of wools. AWPFC expects feed supply will increase the average wool cut per head by 3.2% to 4.54kg greasy. The Australian flock is expected to rebuild with a 4.6% increase in the number of sheep shorn to 70 million.

The screenshot shows the IWTO Member Area interface. At the top, there are navigation links: HOME, MEMBER RESOURCES, IWTO DIRECTORY, FORUMS, and ONLINE STORE. The main content area is titled 'Wool Policy Report' and includes a breadcrumb trail: Member Resources > Wool Policy Report. Below this, there are social media share buttons and a list of reports under the heading '00 2021 Wool Policy Reports'. The list includes the following items:

Item Name	Posted By	Date Posted
IWTO Wool Policy Report No 71 July 2021 DOCX (84.37 KB)	Administration	3/09/2021
IWTO Wool Policy Report No 70 June 2021 PDF (169.51 KB)	Administration	30/06/2021
IWTO_Wool_Policy_Report_No_69_May_2021.pdf PDF (172.4 KB)	Administration	22/06/2021
IWTO_Wool_Policy_Report_No_68_April_2021.pdf PDF (242.2 KB)	Administration	22/06/2021
IWTO_Wool_Policy_Report_No_67_March_2021.pdf PDF (242.33 KB)	Administration	26/03/2021
IWTO_Wool_Policy_Report_No_66_Feb_2021.pdf PDF (219.49 KB)	Administration	26/03/2021
IWTO_Wool_Policy_Report_No_65_Jan_2021.pdf PDF (207.12 KB)	Administration	26/03/2021

On the right side of the page, there is a 'MY PROFILE' section with links for Profile Home, Manage Profile, Create Resume/CV, Groups, Networks, Files & Links, Favorites, Messages (NEW), Connections, and Refer a Friend. Below that is a 'CALENDAR' section with the text 'The upcoming calendar' and a link 'Click here to view past'.

Events

90th IWTO Congress

Destination Digital:

With in-person meetings again constrained, Members flocked to online options

IWTO members embraced the various digital communication tools while we could not meet in person, and we managed to host the regular meetings online. The annual congress was offered on Webex, and 152 participants took part in the virtual discussions offered from 17 – 21 May 2021.

The video presentations were shared on the IWTO Channel after the event, and these can still be viewed here:

<https://www.youtube.com/c/IWTOCHANNEL/videos>

The continued lack of in-person contact was felt by everyone, but the video presentations offered a new wool communication tool reaching far beyond the delegates registered on the day.

The State of Wool Trade: recovery amidst change with Isak Staats has received 342 views and The Campaign for Wool's 10th Anniversary with Peter Ackroyd has clocked up 319 views to date.

The Congress also hosted the regular Executive Committee, C&S Committee, Working Groups and Heads of Delegation meetings.

Meeting times were arranged to fit most time zones, but with IWTO Members scattered over 23 countries and various regions, finding a suitable time for all remains a challenge. Somewhere, someone joins a meeting at an uncomfortable time.



The 90th IWTO Congress was sponsored by loyal supporters of IWTO despite severe financial pressure. We thank them for their continued support.

Events

We were eager to celebrate wool's rich history in Nuremberg during the December 2021 Wool Round Table. When the pandemic produced a new curveball, we were forced to postpone this event until November 2022.

Moved online, the more informal Chat Room structure once again proved popular. IWTO members and guests connected with participants from China, Australia, Canada, New Zealand, Europe and South Africa.

The event took place 29 November – 2 December on Webex and under the Chatham House Rule. Many participants offered key messages to media partners as well as video recordings of their presentations.

The event welcomed 84 participants representing 18 countries and all stages of the wool pipeline. A summary of the event is available on iwto.org. It also featured in Twist Magazine, Issue 1, 2022.

Members from the Chinese National Committee kindly offered video presentations including English translation, offering insight into the manufacturing sector in China and the obstacles members had to face during the pandemic.

All event videos are available on the IWTOChannel:
<https://www.youtube.com/c/IWTOCHANNEL/videos>.

IWTO Wool Round Table

The Round Table 2021 was again sponsored by loyal supporters of IWTO. We thank them for their ongoing support during the pandemic.



Lanas Trinidad



Publications

1. Market Information - Edition 16

A summary of wool trade statistics compiled by Chris Wilcox and the Poimena team, free of charge to IWTO members on the IWTO Member Area under Member Resources. Learn more about wool trade statistics on IWTO's website: <https://iwto.org/resources/statistics/>

2. Red Book

The collection of voluntary standards for the testing of raw wool. Available to IWTO Members free of charge. The publication is available from the Member Area - Member Resources.

3. Blue Book

Book: List of voluntary standards for the testing of raw wool. Available to members, free of charge. The publication is available from the Member Area - Member Resources.

4. White Book

Procedures of testing raw wool, as required by the standards described in the Red Book. Available to members, on the Member Area - Member Resources.

5. IWTO Specifications for Wool Sheep Welfare

Updated by members of the Wool Sheep Welfare Working Group and available on the IWTO website:

<https://iwto.org/resources/wool-sheep-welfare-specifications/>

We thank American Wool for sponsoring Edition 16 of the Market Information

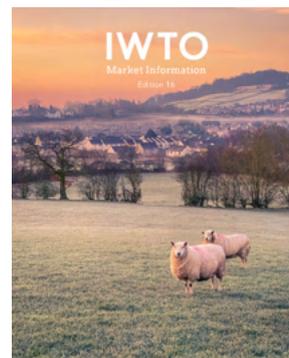
6. Wool Traceability List

A traceable and transparent wool pipeline has become much revered by fashion and textile representatives. IWTO Members have innovated their businesses to reflect the demand from the market and we summarised their efforts here: <https://iwto.org/wool-supply-chain/traceability/>

7. Recycled Wool List

The drive for a circular economy has been enforced by the recent pandemic and renewable sources for textiles have become a much-desired topic for retail sustainability managers. IWTO members offer recycled wool yarn and fabrics in an easy to source list, available for download here:

<https://iwto.org/sustainability/recycled-wool/>



Statistics for the International Association for Textile Industry
Prepared by: Research & Data Department



Comistra SRL

We work to create fabrics and textiles, making recycling the only possible choice to support the environment and the people who use our products.
Our yarns and fabrics originate from recycled raw materials, coming from waste for production or used fabrics, without the use of dyes.
Our products perfectly join the philosophy of the circular economy.

Website	Country	Contact	Name of Fabric	Email
www.comistra.it	Italy	Fabrizio Tosi	Wool and Fabric	info@comistra.it

Filati Omega S.R.L.

Omega Omega was founded in 1982 and has been producing yarns since 1988. We produce about 100,000 tons of yarn per year in 100% virgin and recycled fibers. Thanks to our high quality standards, always focusing on product quality and on customer service, we have built a strong and loyal network of our members, to be able to offer the highest environmental standards.

Website	Country	Contact	Name of Fabric	Email
www.omega.it	Italy	Dr. Stefano Biondi	Yarn	info@omega.it

Member Details

Wool Traceability Systems 2021

Abeluzi Wool

Regard Mowat, with its close link with wool growers, helps brands create sustainable and make their wool. Through Mowat, long-term partnerships have been built and forged with brands, providing full traceability and transparency and ensuring that progressive environmental and sustainable practices can be fully implemented.

Website	Country	Contact	Method	Email
www.abeluzi.com	South Africa	Steve Mitchell	Wool Wool	info@abeluzi.com
www.mowat.com	France	Stewart Mowat		info@mowat.com

Authentic

Authentic was first launched in 1999. It is built on existing standards, best industry practices and leadership in responsible wool growth. The system has the highest animal welfare and environmental requirements. The wool is fully traceable to farm level, as it is generated in complete transparency, to GOTS and OEKO certification.

Website	Country	Contact	Method	Email
http://www.authenticwool.com	Australia	Willy Galley	3rd Party Certification	info@authenticwool.com

Real Wool News

1. IWTO Website

The new look-and-feel website celebrated one year in May 2021, and we continue to update various pages and tabs to optimise search engine activity. The recently added Wool Science tab offers a summary of peer reviewed and published wool science in one place.

The website averages around 4,000 visitors per month and the average session is around 1.30 minutes. Organic search results bring 60% of the visitors to the site, meaning they are finding IWTO easily. Almost 50% of the visitors are younger than 35 and 83% of visitors are 54 years and younger.

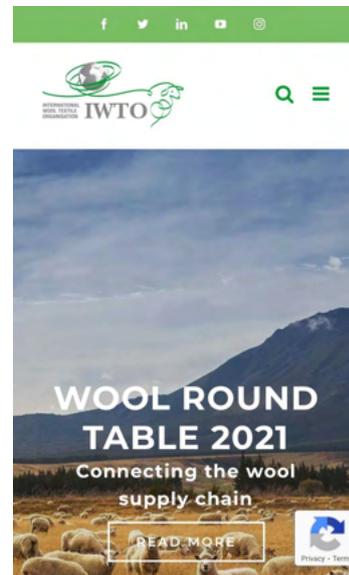
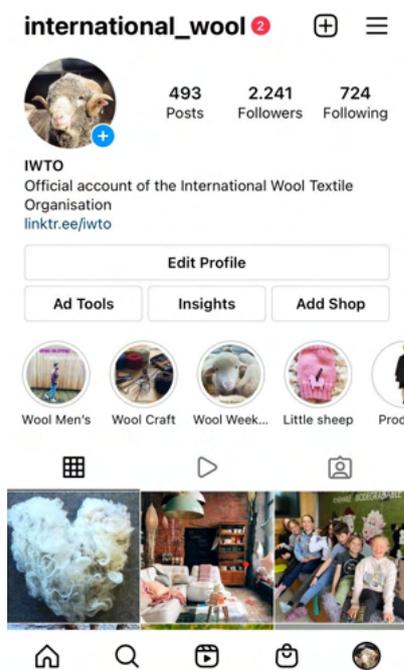
The most visited page is Sustainability – Recycled Wool, with Flame Resistance and Sheep close on its heels.

<https://iwto.org/>

2. Wool Blogs

Regular Wool Blogs have supported the increased views of the IWTO website. We aim to deliver one every two weeks, with the promise to only share Real Wool News.

<https://iwto.org/news/>



3. Social Media

IWTO actively promotes wool news and member activities through Facebook, Twitter, LinkedIn, and Instagram. Do let us know if you have important news to include and remember to share published wool news further, to maximize the reach.

4. IWTO Focus

Members of the Executive Committee offer Heads of Delegation the opportunity to have their say through the annual IWTO Focus document, with the summary being discussed during the annual congress and at the HOD meeting.

5. Ticker Newsletter

The bi-monthly IWTO newsletter keeps the wool community informed on wool happenings around the globe. Previous editions are available on the Member Area, under Member Resources.

Campaign

The EU Product Environmental Footprint process was initiated by the European Commission more than 10 years ago to engage industry role players and design a tool capable of measuring the environmental impacts of clothing and textiles. The process is driven by the Technical Secretariat and IWTO has obtained a seat at the table, through the Sustainable Practices Working Group. The LCA technical advisors have been submitting scientific evidence of the sustainable aspects of wool during the past two years but have shared their concerns about gaps in the current methodology adopted by the PEF Process.

Our concerns are shared by other organisations active in the Natural Fibre Industry and together, we launched the Make the Label Count Campaign in October 2021.

Make the Label Count

We stand ready to support European legislators to ensure future clothing sustainability claims are credible.

Members of the coalition believe sustainability claims must be transparent, accurate and complete and offer a level playing field for all fibres. If biodegradability, renewability and microplastic pollution are ignored in the measuring process, the result will be skewed and will support the fast fashion model, built on the exploitation of cheap labour and fossil fuel-based fibres.



MAKE THE LABEL COUNT

KEY TAKEAWAYS:

- 1 Although laudable in its intent to dispel consumer confusion and encourage alignment in a common sustainability language, there is concern that the EU will use an incomplete methodology to calculate the impact of clothing and footwear, which will result in oversimplified and inaccurate claims on product labels for consumers.
- 2 A collaboration of experts and organisations are working to promote awareness of this issue amongst European policy makers, asking them to amend the PEF methodology before implementation.
- 3 We are asking for your support to advocate for methodology improvements to ensure consumers receive meaningful and balanced information about a product's footprint, which is not biased in favour of any raw material fibre type.



HOW CAN YOU BE INVOLVED?

We invite you to join us in raising awareness and providing solutions to support the EC to achieve its objective for apparel and footwear.

The EC is currently in its consultative stage on relevant fashion textile industry policies, so we have the collective opportunity to submit responses to the EC's consultation over the course of 2021 and 2022. There is also opportunity to raise awareness with Members of the European Parliament who will be voting on the EC's legislative proposal for sustainable products.

Sign up to the Make the Label Count newsletter to stay up to date on the latest news and events at www.makethelabelcount.com

SHARE THE CAMPAIGN!

#MakeTheLabelCount
@makethelabelcount
www.linkedin.com/company/make-the-label-count

WOULDN'T IT BE GREAT TO KNOW WHETHER FABRICS ARE BIODEGRADABLE?

MAKE THE LABEL COUNT

Campaign

“It is fundamental for claims on labelling to be accurate and comprehensive, so it does not misrepresent or unfairly favour certain fibre groups”
- Livia Firth, Make the Label Count co-spokesperson

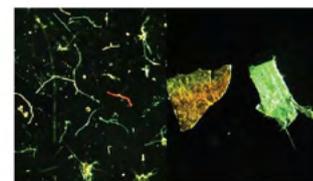
Recent EU Developments – Campaign updates

- The European Environmental Agency published two briefings on sustainable textiles: Textiles and the environment: the role of design in Europe’s circular economy & Microplastics from textiles: towards a circular economy for textiles in Europe. The former argues that to reduce the environmental impacts of textiles, a shift towards circular business models, including circular design, is crucial. The briefing on microplastic from textiles recognises that “textiles made from synthetic (plastic) fibres is one recognised source of microplastics in the environment.” The EEA among others proposes to implement sustainable design and production processes and caretaking measures that control microplastic emissions during use, and by improving disposal and end-of-life processing.
 - MEP Carlo Calenda and 29 colleagues delivered a letter to the EU executive, asking them to carefully consider the upcoming textile legislation and drawing their attention to the PEF Process which could result in supporting the current greenwashing scenario in the clothing and textile sector, if the PEFCR category rules are not adjusted to include renewability, biogradibility and microplastic pollution. The letter was shared by MEP Hilde Vautmans to Twitter. This follows on a joint letter submitted by Austria, Belgium, Denmark, Finland, Luxembourg, Netherlands, Norway, Spain, and Sweden in October 2021.
-

Make the Label Count

HOW COULD THE PEF METHODOLOGY BE IMPROVED?

It is in the consumers’ interest that any method used to assess a product’s environmental footprint is holistic and includes all sustainability impacts of consequence. Being LCA-based, PEF suffers from limitations by focusing only on harmful impacts and failing to account for positive environmental impacts. Social impacts should also be considered for a holistic assessment of a product’s sustainability.



Microplastic fibres (left) and microplastic fragments (right) both from Tyrrhenian Sea seafloor cores at a depth of approximately 800 metres. Source: Textile World

1. Microplastic pollution

Synthetic textiles discharge significant amounts of microplastic fibres through laundering and wear, releasing microplastics into both terrestrial and marine environments, and the human food chain. However, microplastic pollution from synthetic materials is not included in the current environmental impacts of the PEF methodology and therefore does not carry any negative scoring despite increasing scientific evidence of the harmful impact to both planetary and human health. Scientific studies have shown that a typical 5 kg wash load of polyester fabrics can release as many as 6 million microplastic fibres.⁴ It is estimated that, by 2030, synthetic fibres will represent 73% of fibre production, of which 85% will be polyester.⁶

We thank the loyal supporters of the Campaign for their financial contributions; IWTO Sustainable Practices and Product Wellness Working Groups, the Cashmere and Camel Hair Manufacturers Institute, the International Sericultural Commission and Australian Wool Innovation.

Congress 2022

The International Wool Textile Organisation and China Wool Textile Association cordially invite you to Puyuan-Tongxiang for the 91st annual IWTO Congress.

Known as the Capital-of-Sweaters and the City-of-Fashion, this renowned trade area blends old with new. The ancient water town offers an authentic cultural experience, its tranquillity contrasting with a dynamic industry presence. The complete wool manufacturing chain is represented: spinning, knitting, dyeing, and finishing. The Puyuan sweater market features 15 ready-made garment trading areas, 13,200+ retail outlets within 1.7 km².

The programme will be a combination of in-person, live-streaming and online meetings. Sessions include Young Professionals, Sustainability, Market Intelligence and more.

In-person - Hybrid



We look forward to seeing you both in person and on-screen during April for the 91st IWTO Congress, offered in hybrid format by the Chinese Wool Textile Association.

Respectfully submitted,
Dalena White
Secretary General

The secretariat is situated at Rue de l'Industrie 4, Brussels, Belgium. We appreciate your continued participation and regular contact during the past 12 months, especially under the difficult circumstances experienced globally. We look forward to seeing you again soon and hope that we can meet in-person at your earliest convenience. The office can be contacted on +32.2.505.4010 or on info@iwto.org.



Dalena White, Secretary General
white@iwto.org



Jeannette Cook, Communications Manager
cook@iwto.org



Representatives of the Canadian Wool Council visited IWTO in October 2021.



Amanda Millard, Office & Events Manager
millard@iwto.org



Ben Roberts, Finance & Project Officer
roberts@iwto.org



DEEP

WWW.DEEPAGENCY.CO.ZA

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